



# Strengthening Organizations to Mobilize Californians

Lessons Learned from a Major Initiative to Build the Capacity of Civic Engagement Nonprofits

Funded by

THE WILLIAM AND FLORA  
**HEWLETT**  
FOUNDATION

the **James Irvine** foundation

the David &  
Lucile **Packard**  
FOUNDATION

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# Executive Summary

## Introduction to the Initiative

From 2008 to 2010, twenty-seven community-organizing nonprofits in California took part in an unusual and ambitious statewide initiative, *Strengthening Organizations to Mobilize Californians* (the “Initiative”). Funded by three leading foundations – The James Irvine Foundation, The William and Flora Hewlett Foundation and David and Lucile Packard Foundation – the Initiative sought to help nonprofits strengthen their organizations by focusing on such key areas as leadership, decision-making, communication and fundraising.

The premise was that stronger organizations could better meet the needs of communities and give their residents more of a voice in civic life. Thus, through the Initiative each foundation sought to support its broader purpose, from improving educational opportunities and access to health care to increasing civic engagement and reforming California’s governance system to better reflect the state’s diversity.

The Initiative specifically explored how different approaches to working with organizations supported change. How did peer exchanges compare with trainings that relied more on expert input? Would convenings enable the kind of networking that organizations need to develop and build momentum for their ideas? How much additional benefit would nonprofits derive from additional coaching time? Findings from the Initiative hold implications for other philanthropic staff members who seek to design, implement and improve capacity building.

The insights and lessons presented in this report were distilled through an assessment process that included:

- A review of data gathered through Event Feedback Forms completed by participants at each activity and event over the course of the Initiative
- A post-Initiative survey administered online to all participating organizations, with a response rate of 39 individuals representing 24 out of 27 organizations (89%)
- Two focus groups attended by 10 executive directors and senior staff from participating organizations
- Reflective conversations with the foundation partners

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The Initiative’s insights draw on TCC Group’s considerable experience in capacity building. TCC has conducted nationwide studies on organizational effectiveness and written extensively about organizational capacity building, including *Strengthening Nonprofit Performance: A Funder’s Guide to Capacity Building* (Wilder and GEO, 2004); *Navigating the Organizational Lifecycle: A Capacity-Building Guide for Nonprofit Leaders* (BoardSource, 2006); *Deeper Capacity Building for Greater Impact: Designing a Long-term Initiative to Strengthen a Set of Nonprofit Organizations*, which was funded by the Irvine Foundation; *Building the Capacity of Capacity Builders*, which was funded by the Packard Foundation; and *The Sustainability Formula*. The firm has also designed, managed, and evaluated numerous local, regional, and national capacity-building initiatives across many sectors, including advocacy and community mobilizing.

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## Background

The Initiative's theory of change was that stronger organizations would become more effective at mobilizing people and communities, networking with other organizations and those who influence public policy, and advocating for better governance and democracy. Such efforts would ultimately improve public discourse on critical issues for underrepresented communities and influence California's decision-making. (See page v for the Initiative's logic model.)

The Initiative's immediate goal was to increase the organizational capacity of participating nonprofits. TCC Group, a management consulting firm that serves funders and nonprofit organizations nationally, worked with the three foundations to design and manage the program. Part of this design was to measure specific indicators of success, including increased knowledge of how other organizations address capacity building; stronger awareness and clarity around priorities for building capacity; increased motivation and confidence to implement improvements; and enhanced ability to network and partner with other organizations.

To achieve these aims, the funders provided a broad range of support – namely, grants, coaching, and a variety of group activities that formed the basis of a dynamic learning community including convenings, regional trainings, and peer exchanges. While these activities on their own were not necessarily new, together they represented a unique experiment to compare their effectiveness and test how they worked on their own or in a coordinated way.

What's more, the scope of the Initiative set it apart. Not only did 27 community organizations participate voluntarily, but all told, they had access to 32 learning community events in a span of 24 months. Such an ambitious scale enabled the Initiative to glean insights that otherwise would not have been possible.

The Initiative was organized to offer two distinct tiers of support to participating organizations. One was centered around capacity-building grants and included extensive coaching, and the other focused on collective activities through a Learning Community.

| Success Indicators   | Survey Respondents (N=39)<br>Reporting Organizational<br>Improvements |
|--|---|
| Increased organizational capacity  | 82%   |
| Increased knowledge of how other organizations have addressed capacity-building issues   | 81%   |
| Increased awareness of and clarity around priority capacity-building needs               | 81%   |
| Increased motivation and confidence to implement capacity-building efforts               | 86%   |
| Enhanced ability to network and partner with other organizing and advocacy organizations | 39%   |

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## Learning Community Activities

The Initiative's Learning Community consisted of peer exchanges, trainings, and convenings, which offer distinct benefits and experiences:

- **Peer exchanges** are meetings of peers, who share similar positions in their organizations. The participants play a central role in designing and leading sessions. At their best, they foster trust, critical inquiry, and open sharing of experience and advice. Participants typically go back to their organizations to try out ideas, and then come back to the same group for discussion and feedback from the group.
- **Trainings** are probably the most familiar and traditional form of Learning Community activity. They feature a guest speaker who shares expertise on such topics as creating a communications plan. While not groundbreaking, trainings can vary significantly in effectiveness depending on design and other factors.
- **Convenings** are large gatherings that enable networking, informal discussion, and interchange around a central idea. Typically, they feature one or more speakers. They tend to focus more on big-picture ideas and inspiration as opposed to specific skills training.

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## Capacity-Building Grants

Six grantees of the Irvine Foundation received capacity-building grants, ranging from \$50,000 to \$150,000 over three years to spend on consultants, technology, and other needs. Beyond this financial support, they were provided with access to 60 hours of coaching for their leadership teams to develop and implement capacity-building plans.

## The Learning Community

Through the support of the Irvine, Hewlett, and Packard Foundations, 27 organizations, including the six Capacity-Building Grant recipients, participated in two separate peer exchange tracks (one for executive directors and another for senior staff); six regional trainings with two to four hours of optional follow-up coaching after each training; and two annual convenings.<sup>1</sup>

## Lessons and Insights at a Glance

### Strategies and Outcomes

- ▶ **Lesson 1:** Provide grants and in-depth coaching to effect the most change, particularly at the level of organizational behavior change.
- ▶ **Lesson 2:** Ensure that trainings and peer exchanges improve organizational capacity, even if no grants are given. Leverage convenings for networking and collaboration.
- ▶ **Lesson 3:** Help organizations participating in a learning community understand which activities will complement their capacity-building efforts and priorities.

### Design

- ▶ **Lesson 1:** Engage participants in the design of an initiative. Focus the capacity building on a reasonable number of priority outcomes.
- ▶ **Lesson 2:** Develop a contingency plan for likely foundation-level changes to strategy, budgets, or portfolios.

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<sup>1</sup> For the remainder of this report, the word “participant” refers to both Capacity-Building Grant recipients and Learning Community-only participants unless otherwise specified.

## Readiness

- ▶ **Lesson Learned:** In assessing readiness, emphasize the executive director's support; capacity-building experience is less important.

## Participation

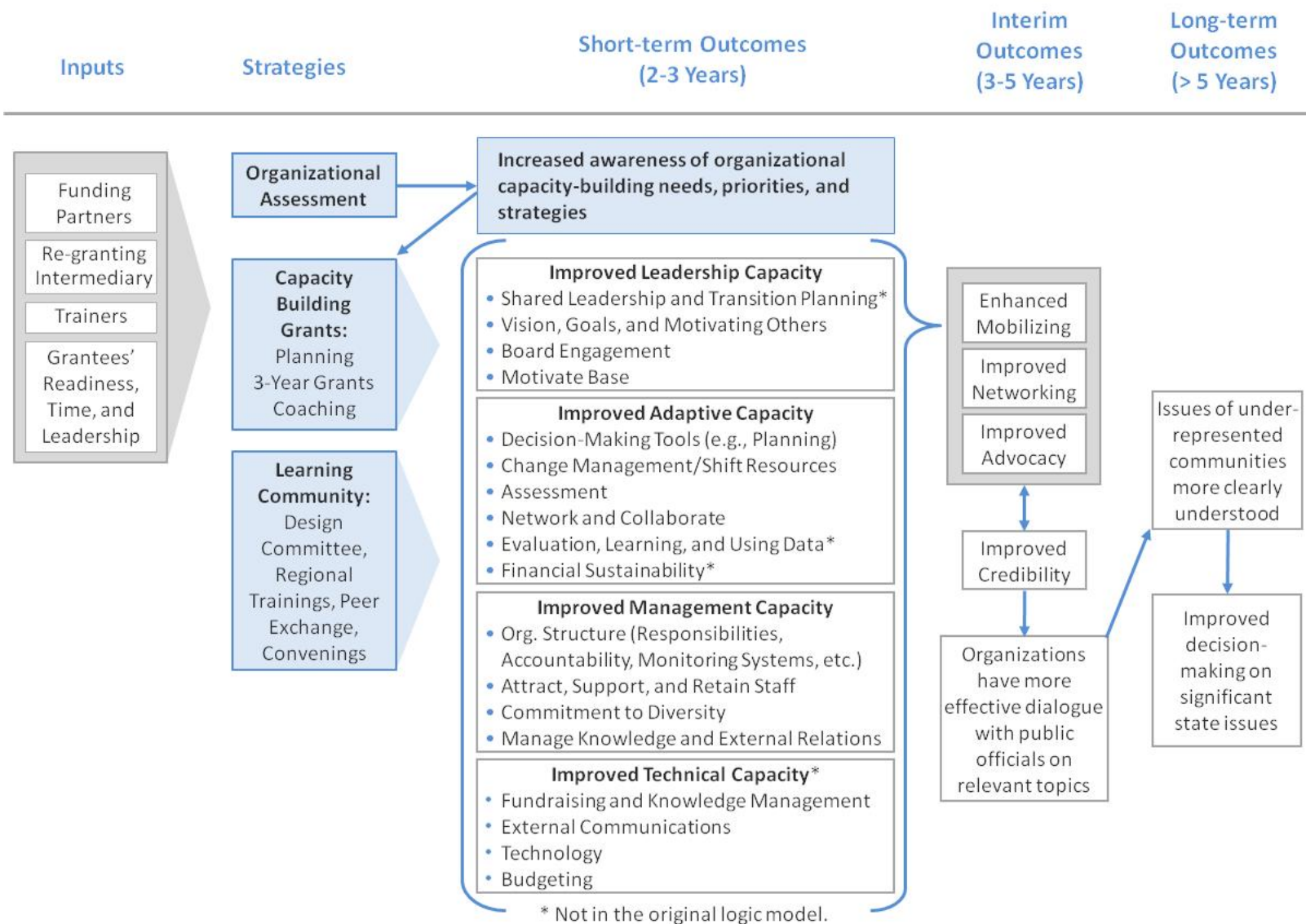
- ▶ **Lesson Learned:** Build in sufficient planning for organizational attrition and staff turnover, especially for voluntary capacity-building programs. Think through the relationship among participation, outcomes, and cost to the nonprofit and funder.

## Initiative Participants

| Organization  | Location         |
|---|------------------|
| <b>Learning Community Participants</b>  |                  |
| ACCESS/Women's Health Rights Coalition  | Oakland          |
| Alliance for a Better Community (ABC)   | Los Angeles      |
| Asian Communities for Reproductive Justice (ACRJ)                             | Oakland          |
| Center for Community Action & Environmental Justice (CCA EJ)                  | Riverside        |
| Central Coast Alliance United for a Sustainable Economy (CAUSE)               | Ventura          |
| Coalition LA  | Los Angeles      |
| Communities for a Better Environment (CBE)                                    | Huntington Park  |
| Congregations Organizing for Renewal (COR)                                    | Hayward          |
| Consejo de Federaciones Mexicanas en Norteamérica (COFEM)                     | Los Angeles      |
| Contra Costa Interfaith Supporting Community Organization (CCISCO)            | Martinez         |
| East LA Community Corporation (ELACC)   | Los Angeles      |
| East Yard Communities for Environmental Justice                               | City of Commerce |
| Ella Baker Center for Human Rights  | Oakland          |
| Immigrant Legal Resource Center (ILRC)  | San Francisco    |
| LA Voice PICO   | Los Angeles      |
| Oakland Community Organizations (OCO)   | Oakland          |
| Pacoima Beautiful   | Pacoima          |
| People Acting in Community Together (PACT)                                    | San Jose         |
| PICO California   | Sacramento       |
| Strategic Actions for a Just Economy (SAJE)                                   | Los Angeles      |
| WILDCOAST/COSTASALVAJE  | Imperial Beach   |
| <b>Capacity-Building Grant Recipients and Learning Community Participants</b> |                  |
| Center for Community Advocacy (CCA)   | Salinas          |
| Center on Race, Poverty & the Environment (CRPE)                              | San Francisco    |
| Environmental Health Coalition (EHC)  | San Diego        |
| Inland Congregations United for Change (ICUC)                                 | San Bernardino   |
| Los Angeles Alliance for a New Economy (LAANE)                                | Los Angeles      |
| Orange County Congregation Community Organization (OCCCO)                     | Anaheim          |



## Strengthening Organizations to Mobilize Californians: Simplified Logic Model



# Lessons and Insights

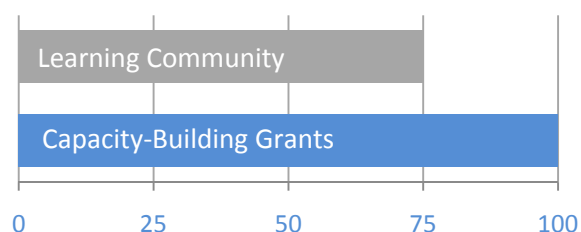
## Strategies and Outcomes

### Lesson #1:

- Provide grants and in-depth coaching to effect the most change, particularly at the level of organizational behavior.

One would expect that multi-year grants paired with 60 hours of coaching to leadership teams would net better results than group learning activities. This was the case for Grant recipients, who were more likely to report behavioral changes in organizational capacity than Learning Community-only participants. As one grantee explained, “The grant helped us develop ongoing, permanent capacity within the organization. This has been critical. The original CCAT assessment helped us identify where we needed to go. The grant helped us build capacity. The coaching and group activities helped us get to where we wanted to go.”<sup>2</sup>

### Percentage of Respondents Indicating Change in Overall Organizational Capacity



<sup>2</sup> The Core Capacity Assessment Tool is TCC Group’s online organizational assessment that identifies strengths and weaknesses in terms of adaptive, leadership, management, and technical capacities. All Grant recipients took the CCAT, as did other organizations who participated in the Learning Community.

How big was the difference in results between Capacity-Building Grant recipients and Learning Community-only participants? Based on self-perception, Capacity-Building Grant recipients noted a 20 percent improvement in donor/member databases and fundraising knowledge over Learning Community-only participants. They also rated themselves as making 10 to 19 percent more improvement in terms of:

- Utilizing up-to-date technological infrastructure and adequate technology skills
- Creating a communications plan and effectively communicating with stakeholders
- Assessing their organization
- Articulating their organization’s vision
- Implementing changes to operations
- Building organizational capacity
- Sustaining results

In addition, Grant recipients reported slightly higher levels of change when engaging their boards in fundraising, integrating fundraising and organizing, improving their websites and using social media.

All six Capacity-Building Grant recipients reported specific changes that have been integrated throughout their organizations. These tangible improvements included new evaluation systems, coordinated development campaigns, more effective management teams, an enhanced culture of fundraising, restructured boards, reorganized staffing, new performance standards and practices, conflict resolution protocols, shared server technology, and improved planning.

It is important to note, however, that five Learning Community-only participants shared similar anecdotes about organization-wide changes related to fundraising, social media and “shared leadership,” which manifested in a



number of concrete behavior changes by leaders and staff.<sup>3</sup>

Many Grant recipients described how the group learning activities complemented their capacity-building work. As one staff member noted, “The Learning Community activities allowed us to gain more individualized attention [through the follow-up coaching], learn from ally organizations, and build additional skills. The peer exchange activities helped build the second tier of organizational leadership by providing new skills to a new manager. The regional trainings also helped build the skills of several staff at once. It is rare that more

than one person attends a training so to be able to have several staff receive the same information at the same time helped in brainstorming and actualizing next steps.”

In summary, grants with coaching are more effective than group learning activities alone in achieving behavior-level capacity change. At the same time, group learning activities hold significant value, whether on their own or as a complement to grants and coaching. They can significantly add to capacity-building gains by building skills and offering peer insights, as explored in more detail below.

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### The Coaching Advantage

One finding of the Initiative was that Grant recipients reported a bigger benefit from coaching than from funding alone. Coaching provided the critical link in moving organizations beyond readiness and knowledge of capacity-building techniques to implementation. One key reason was a focus on taking a systemic approach to change. Another was the involvement of multiple leaders in coaching to create buy-in throughout the organization.

Coaching enabled one executive director to work through what it actually takes to delegate more responsibility and allow others to take on new decision-making roles. Through coaching, staff members at another organization turned buzzwords about work/life balance into carefully considered decisions about which programs to focus on and which to let go. In a third group, coaching allowed leaders to step back and reflect on growing the organization and make midcourse corrections.

In other words, in-depth leadership coaching enabled the kind of day-to-day exploration and practice that support lasting behavior change.

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<sup>3</sup> Shared leadership is defined as expanding authority beyond one or a few certain positions to the group so that individuals at all levels are engaged in creating and sustaining the vision, prioritizing and making decisions, and taking actions that benefit the whole organization.

## Strategies and Outcomes

### Lesson #2:

- Ensure that trainings and peer exchanges improve organizational capacity, even if no grants are given. Leverage convenings for networking and collaboration.

The Initiative demonstrated that organizations can reap significant benefits from less expensive options than grants or extensive coaching. Those that participated only in Learning Community activities perceived notable increases in their organizational capacity, particularly in awareness, knowledge, and skills. In a few cases, survey and focus group results showed that some of these nonprofits reaped greater gains than Capacity-Building Grant recipients. For instance, more Learning Community-only participants indicated that they could engage in succession planning or integrate lessons learned into future plans as a result of the Initiative.

**Interestingly – and somewhat surprisingly – the regional trainings were the most effective Learning Community activities.** Conventional wisdom holds that one-time events are less likely to bring lasting benefits, but the Initiative’s find-

ings underscore that traditional approaches can be tweaked for better results and even slight variations can make a difference.

One example of a significant benefit stemmed from the Initiative's 2008 training on communications planning. It was correlated with positive results on several different outcomes, including perceived improvements in articulating the organization's vision, developing a communications plan, implementing plans, managing change, and the ability to sustain results. The most successful trainings exhibited the following qualities:

- The **presenter was highly knowledgeable and effective at guiding discussion.**
- The training was practical with **useful hand-outs, concrete takeaways to guide improvements, and real-time gains in knowledge or skills.** Each training included **hands-on worksheets, role plays, and/or action planning.** As one participant commented, "I learned new skills in the trainings that I have been able to implement in my work."
- The **discussions** were open, forthcoming, and fostered trust, enabling a productive sharing of experiences. One participant explained, "I was really impressed with the level of talent in all the trainings, from the facilitators to presenters to participants. I learned a lot." Another added, "It allowed us to compare our strengths and weaknesses with other peers and learn from their experiences."

Some of the most interesting insights stemmed from the fact that many of the trainings in the Initiative were similar to others that participants could access elsewhere. What made the Initiative trainings stand out? According to participants, the key differentiators could be summed up as follows:

- "The trainings fit a social justice framework and were **relevant** to the communities that our organization serves."
- "Most [trainings] were **tailored to small organizations** and offered strategies that could be applied with limited staff capacity and resources, something that is rare for trainings offered by other capacity building organizations."
- "We were **able to send a whole team** ... and ... used that to convene a small planning group that developed a basic plan for engaging others and taking some beginning steps."

**Another finding that raises questions for further exploration was that the follow-up coaching to the trainings may not have been as effective.<sup>4</sup>**

Several organizations commented that they appreciated the follow-up coaching, but wanted more than the two to four hours allotted per organization. But the Initiative's findings did not necessarily support the idea that more coaching would be beneficial. Statistically, the coaching that was provided seemed to have a negligible effect on outcomes. Not only did the coaching and the specific training it followed correlate with exactly the same level of change, but they brought change in the same areas. In other words, if the training increased awareness, the coaching increased awareness as well, without additionally improving knowledge, skills, or behaviors.

This finding raises two significant questions. First, **what is the impact of follow-up coaching, if any? Does it expand, deepen, or sustain change?** And second, **is more than 2-4 hours of coaching time needed to make it effective?**

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<sup>4</sup> Training attendees could optionally participate in two to four hours of follow-up coaching with the presenters within six months of the training. Coaching included follow-up webinars, in-person meetings, review of documents, and conference call check-ins. It was significantly less intensive than the on-going coaching provided to the Capacity-Building Grant recipients.

**In addition to the trainings, the peer exchanges were also highly effective.** The executive directors and senior staff who participated in their respective tracks perceived that their organizations developed additional “shared leadership” as a result of the Initiative. Indeed, it was at one of the early peer exchanges that participants seized on the idea to explore shared leadership throughout the Initiative and encouraged TCC to re-design future sessions to include this lens.

With their cultivation of trust and openness, the peer exchanges enabled participants to uncover a fundamental insight: that as committed as they were to improving democracy and governance, they had not fully incorporated some of those principles about sharing power and decision-making into their own organizations.

Their excitement and vibrant discussion around shared leadership provided a window onto the unique benefits of peer exchange. They also underscored two other significant features of the Initiative. First was flexibility; in response to the strong interest among participants in shared leadership, it became a more prominent part of both trainings and the peer exchanges. A second, related idea was that the Initiative was not top-down but instead intentionally set out to be co-designed and led by participants. This approach lent both credibility and authenticity to the Initiative, as the same principles of good governance at the core of participating organizations were embedded into its design and implementation.

One participant in the peer exchanges explained their value by saying, “We have begun to adopt a shared leadership mentality in the organization and have utilized the peer coaching and crucial conversation tools to support staff, address challenges, and be accountable to one another.”

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*“I have completely restructured the way that I conduct evaluations of my programs and reviews of my staff. I use peer-coaching with my staff when we have program check-ins and strategy sessions. My participation in the senior staff peer exchange, specifically, has provided me with a new network of colleagues and friends who I can turn to with questions and to use as a sounding board for ideas or problems. Having this network and the new skills in management and managing change, has definitely helped me become a much more competent, organized and confident manager and leader in my organization AND amongst my colleagues in my movement.”*

~ Senior staff member

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According to the event feedback forms and the post-Initiative survey, the peer exchanges exhibited the following qualities:

- **Discussions were productive**—there was a **balance between giving and receiving information** among participants, with all **attendees contributing to other people’s learning** and having adequate **time to get meaningful feedback** from all participants. As one person said, “Exchanging experiences and ideas with staff from other organizations was perhaps the most insightful part of this Initiative.”
- The peer exchanges led to **new knowledge, skills, or insights that were immediately useful**. For instance, one participant shared, “I expanded my understanding of the skills necessary to be an effective supervisor and manager.” Another commented, “It really helped my confidence level and ability to help coach others at my office.”
- The **facilitator was knowledgeable and effective at guiding discussion**.
- The peer exchanges provided a **safe space to reflect, learn, and practice**. One person explained, “The executive director peer

exchanges have allowed me to think about my work in a more holistic manner, which allows me to step outside of the situation at hand and analyze how to better approach a potential solution.” Another participant noted that it was “a time to focus in on leadership and supervision practices that I feel are critical to my personal and my organization's success.”

- The peer exchanges were **tailored to and led by** the participants. As one person said, “It was so great to have [the facilitator] ask us what we wanted to focus on and, as a group, decide on our priority issues.”

**The convenings were useful for networking and collaboration but less effective for learning.** The convenings had the highest total number of attendees, individually or organizationally, and were rated as high as the trainings and peer exchanges in terms of quality. Participants particularly scored the convenings as highest in enabling them to build or start strategic partnerships or collaborations, as compared to the trainings and peer exchange.

At the same time, the convenings were correlated with the fewest changes in organizational capacity, as perceived by Initiative participants. Perhaps this was because the convenings were designed as events to connect with other grantees, hear motivational speakers, and be exposed to a range of topics. It is possible that the convenings addressed too many issues. As one attendee remarked, “I feel that they could have been more focused—there could have been tracks to focus on one area of growth. At times, there were too many ideas to implement all of them.”

In summary, group learning activities have a key role to play in building organizational capacity, particularly at the level of awareness, knowledge, and skills. In some cases, they can create even greater impact than grants. Trainings, even one-time sessions, can have a very positive impact,

especially if they are practical, hands-on, action-oriented, and feature a knowledgeable presenter.

Follow-up coaching may not be necessary, based on these findings, though funders may want to test out the duration and focus of coaching to better understand how it can be used for maximum effectiveness. Peer exchanges can also be very effective, especially when they foster productive, confidential peer discussion, the exchange is designed and led by participants, and the sessions are guided by skilled facilitators. Convenings that cover a range of topics are less effective for learning, but offer a highly effective forum for networking and collaboration, assuming they enjoy broad attendance.

## Strategies and Outcomes

### Lesson #3:

- Help organizations participating in a learning community understand which activities will complement their capacity-building efforts and priorities.

Ninety-one percent of participants said that the Initiative's purpose and upcoming activities were explained at most, if not all, events. Calendars and invitations were sent regularly to all attendees. However, even at the end of the Initiative, new attendees remarked, “I wish I had been aware of the opportunity for me to have participated more.” This sentiment was also expressed in the focus groups. As one person said, “if I had only known that the topics matched what we are doing anyhow, I would have participated more.”

In retrospect, targeted and ongoing coaching for Learning Community-only participants may have helped to address this concern. One person explained that, “Even more helpful [would have been] having organizational access to the skilled guides at TCC to adapt general information and opportunities to our specific organization's context.”

General Initiative coaching would have allowed each organization to have an annual conversation about their capacity-building priorities, how they were already planning to address them, how the Initiative's offerings could fit into these plans, and who should participate. It is possible that, with this type of individualized guidance, more people would have been able to see Strengthening Organizations to Mobilize Californians as a solution or resource for their most pressing capacity-building needs.

## Design Lesson #1:

- ▶ Engage participants in the design of an initiative. Focus the capacity building on a reasonable number of priority outcomes.

One of the most distinguishing characteristics of the Initiative was its focus on soliciting continuous input from participants on its design. This input included organizational assessments (i.e., the CCAT); a survey to understand participants' interests; a committee of seven participating organizations that took part in a one-day planning retreat and individual advisory calls throughout the first year; interviews with each participating organization's executive director; attendee feedback surveys for each event; and quarterly suggestions from peer exchange participants. **The most important components turned out to be the CCAT, interviews with the executive directors, and the grantee committee.**

The CCAT helped identify underlying capacity issues that were less readily apparent (e.g., an organization's lack of a fundraising culture), whereas individuals tended to pick more tangible challenges that were merely symptoms of the underlying issue (e.g., inexperienced fundraising staff). Meanwhile, the interviews with executive directors provided detailed insights regarding each organization's capacity-building activities, learning preferences and constraints.

The results allowed the funder collaborative to make adjustments to meet participants' needs. For example, it expanded the pool of grantees so that leaders and staff could make new connections. Feedback also led to the whole idea of a senior staff peer exchange, so that the benefits of this opportunity were not limited to executive directors. Additionally, input reinforced the need to ground all Learning Community activities within a movement-building context. Finally, the committee of participating organizations assisted in making formative decisions about the types of Learning Community activities that would be offered.

One complexity emerging from the solicitation of feedback was that it led to an ever-growing list of potential capacity-building priorities that fit within the scope of the Initiative's logic model (see on page v of the Executive Summary). The Initiative could have tried to respond to all of these priorities by addressing several issues during each Learning Community activity. However, the committee of participating organizations recommended that the Initiative focus instead on a few topics in-depth – advice that the funding partners took to heart.

Ultimately, the Initiative focused on the top four priority outcomes that emerged through the various feedback channels:

- *Learning and evaluation* within adaptive capacity
- *Fundraising* within technical capacity
- *Communications* within technical capacity
- *Shared leadership* within leadership capacity.<sup>5</sup>

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<sup>5</sup> Adaptive Capacity is the ability of a nonprofit to monitor, assess, and respond to internal and external changes. Leadership Capacity is the ability of all organizational leaders to create and sustain the vision for their organization, inspire others around that vision, prioritize, make decisions, and provide direction driven by that vision. (Continued on next page.)

These topics easily fit as new additions to the Initiative's logic model. More importantly, they kept the scope of the Initiative from becoming so all-inclusive that no single issue would be addressed in-depth.

| Short-Term Outcome        | Respondents (N=39) Perceiving an Increase   |
|---------------------------|---|
| <b>More of a Priority</b> |   |
| Shared Leadership         | 78%   |
| Fundraising               | 81% for integrating fundraising and organizing<br>58% for fundraising from major donors |
| Communications            | 76% for communications planning<br>74% for using social media                           |
| Learning and Evaluation   | 67%   |
| <b>Less of a Priority</b> |   |
| Budgeting                 | 33%   |
| Partnering                | 39%   |

The importance of this focus is revealed in the table below. **Reported outcomes were significantly better in those areas in which the Initiative focused or prioritized its offerings.** Between 58 percent and 81 percent of respondents to a post-Initiative survey reported improvements in one of the four prioritized outcomes. By comparison, only 33 percent to 39 percent reported improvements in other areas.

The Initiative employed four specific tactics to align the Learning Community activities with the four priority outcomes:

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(Continued from previous page.) Management Capacity reflects a nonprofit's ability to ensure the effective and efficient use of resources. Technical Capacity refers to the technology, skills, tools, and facilities needed to deliver programs, run campaigns, and manage operations.

1. **Multiple sessions were assigned to each outcome.** For instance, there were two communications trainings. The first, on communications planning, was designed for broad appeal while the second, on social media, was more specialized for organizations working online.
2. **The outcomes were reinforced at the annual convenings through peer sharing.** For instance, at the 2010 convening, Initiative participants discussed how they measure success in achieving social change as a follow-up to an earlier training on evaluating advocacy campaigns.
3. **Organizational learning and shared leadership were interwoven into each Learning Community activity.** For example, the major gifts fundraising training included a section on learning from prior fundraising activities and developing a fundraising leadership team.
4. As a result of the focus on these four outcomes, **less time was devoted to the other outcomes** listed in the logic model (e.g., board engagement, networking and collaboration, and budgeting).

The first three tactics were intended to encourage repeated exposure to the priority issues. However, organizations often sent different staff to each activity and rarely attended all of the activities. The result, therefore, was that an organization was exposed repeatedly to a priority issue but rarely was the same person within the organization involved multiple times. Given that the intent was for the same people to attend multiple events, it was the surprising that the events still produced such significant impact. Uncovering the reasons may merit further examination.



One key finding was reinforced repeatedly: that organizational assessments, participant interviews, and a committee of participating organizations were critical for gathering data and ultimately designing a responsive capacity-building initiative. It is important to note that being responsive does not mean doing everything; in fact, participant feedback is especially useful to help focus an initiative on a reasonable set of outcomes. Group learning activities can be further aligned with these priorities by reinforcing key themes across activities. This Initiative points clearly to better results from hewing to prioritized outcomes and a focused design.

## Design Lesson #2:

- ▶ Develop a contingency plan for likely foundation-level changes to strategy, budgets, or portfolios.

With multi-year initiatives, change at the foundation-level is inevitable. From the planning phase in 2006 through the end of the Initiative in 2011, program budgets, grantee portfolios, and/or overall foundation strategy changed for each of the funding partners. Rethinking foundation strategy, in particular, is an iterative process that happens over a long period of time.

As both Hewlett and Irvine went through this evolution, some participating organizations learned that they would not be eligible for future core funding. Program officers also had varying amounts of time available to commit to the Initiative and its participants. Thus, communication difficulties arose in coordinating around these changes within each foundation, among funding partners, and between TCC and participating organizations.

In retrospect, while change is often unpredictable, it may have been helpful to have a contingency plan. For instance, there may have been a way to leverage and communicate the Initiative as an exit strategy for organizations that would lose funding and a means to support them in the transition.

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Carefully framing and assessing the indicators of a nonprofit's readiness to undertake capacity building can contribute significantly to achieving the desired outcomes for each participating organization and the initiative as a whole.

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Alternatively, there may have been a way to recalibrate who participated in the Initiative to represent the new grantee portfolios better. Finally, there could have been a collective discussion about mid-course changes given the foundations' revised strategies.

## Readiness Lesson Learned:

- ▶ In assessing readiness, emphasize the executive director's support; capacity-building experience is less important.

It is a well-established "best practice" in the capacity-building field to first consider and weigh a nonprofit organization's readiness to engage in capacity building before any work takes place. Even the best-designed capacity-building interventions will have little if any impact if there is not a clear indication that the nonprofit's staff and board meet certain readiness criteria, such as:

- Stable senior staff
- Adequate financial and human resources to implement and sustain capacity building
- Previous experience in capacity building and working with external advisors
- Motivation to change
- Strong set of core programs or services
- Basic organizational systems and processes
- Absence of a current organizational crisis
- Mutual respect and cooperation among staff and board

- Strong understanding of the organization's needs and priorities, capacity-building plan, and change management strategies
- Clear desire to self-reflect, learn, and develop
- Shared commitment to enhance the organization's effectiveness
- Previous positive experience with organizational change

In selecting the Learning Community participants and specific Capacity-Building Grant recipients, the Initiative's planners used the first six of these readiness criteria. Specifically, they took into account the following considerations:

- Motivation of organizational leaders – both staff and board – to build their organizational capacity
- Number of staff, board members, and volunteers available to conduct capacity-building work over multiple years and organizing cycles
- Stability of the organization's staff structure
- Reliability of organizational funding sources, particularly those related to its core work
- Depth of the organization's experience with prior capacity-building efforts

In discussing the selection of organizations to participate in the Initiative, planners also shared insights based on their previous experiences with the applicants regarding the sophistication of their organizational systems, the ability of the executive director to contribute to a learning community, and whether community organizing was integral to their programs.

**The executive director's support for capacity building, as expressed in the applications, was an excellent readiness screen.** This factor was positively correlated with increases in several outcomes:

- Organizational effectiveness through the Initiative's tools and resources
- Ability to sustain changes
- Effective communication with external constituents
- Awareness of fundraising and organizing
- Organizational capacity

The Initiative's planners assumed that having the executive director's interest in and commitment to participate in capacity building would result in a similar level of interest and participation from board and staff. However, **having the support of the executive director did not necessarily mean that the staff or board supported building capacity.**

In the post-Initiative survey, participating organizations were asked to assess what their level of readiness to undertake capacity-building activities was at the outset of the Initiative. Almost all respondents (93 percent) "agreed" or "strongly agreed" that their organization's executive director understood the purpose and expected outcomes of the Initiative.

When asked if senior staff members at their organization agreed with and understood the purpose and expected outcomes of the Initiative, just 61 percent "agreed" or "strongly agreed." In addition, just over half of respondents (53 percent) "agreed" or "strongly agreed" that their board of directors supported the group's participation in the Initiative.<sup>6</sup>

It may have been valuable to ascertain the interest, commitment, and willingness to participate in the Initiative of the participating organizations' staff. For example, post-Initiative survey respondents who reported strong senior

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<sup>6</sup> Executive Directors made up 31 percent and Senior Staff members 56 percent of post-Initiative survey respondents (n=39).

staff support were more likely to indicate that they were “more motivated and confident” about building the capacity of their organizations than before the Initiative. Also, having staff buy-in may have improved staff participation in the Initiative.

The Initiative’s planners assumed that budget and staff size would serve as a proxy for having adequate financial and human resources to implement and sustain capacity building. However, in the post-Initiative survey, four out of ten respondents were “unsure” or “disagreed” that their organization had the capacity needed to participate in the Initiative.

The survey did not reveal whether participating organizations lacked capacity from the beginning or if cutbacks reduced capacity over time; what is clear is that staff and budget size were not sufficient to screen all the organizations without the resources to participate fully. Alternatively, perhaps perception, which is subjective, is at odds with objective metrics, suggesting that readiness is a complex amalgam of emotion and facts.

Questions emerging from these findings include:

- Could there have been an additional readiness screen to identify the six out of ten organizations that had the capacity to participate, and if so, what would it be?
- Could there have been a way to help organizations understand the capacity it would take to participate so that they would opt out if they were not able to dedicate the time and resources?
- Finally, is there value in seeking to identify the intangible elements that may make staff feel their organization is ready – or not?

Finally, the results from the post-Initiative survey suggest that organizations with a prior history of capacity building performed worse than those

without a previous history. On the surface, this seems counterintuitive to commonly accepted practice which holds that a track record of success in capacity building is a critical readiness factor.

However, upon consideration, it makes sense that **organizations that were new to capacity building would make greater strides than organizations that had previously engaged in capacity building.** In fact, those with no previous track record in capacity building outperformed experienced organizations and improved capacity in several areas such as:

- Staff involvement in decision-making
- Accountability
- Workload management
- Awareness of communication planning
- Awareness of fundraising and organizing
- Awareness of using websites and social media to build a base
- Board engagement in fundraising

These findings correspond with TCC’s anecdotal observations of peer exchange participants. Based on reports of progress made between sessions, for example, it seemed that people who were new to building their organization’s leadership capacity immediately absorbed new ideas, tools, and techniques and applied them to their organizations. Participants who had experience with building leadership capacity more often referred to the experience as a helpful refresher that reinvigorated or fine-tuned existing efforts.

In summary, executive director support is a critical readiness factor for successful capacity building. Organizations that reported higher levels of staff buy-in also performed somewhat better. Having the capacity to participate in capacity building is another important readiness factor; however, there needs to be additional criteria for this beyond staff and budget size.

Finally, for this Initiative, a history of previous capacity building seemed to have a leveling off effect on the results. That is, organizations with a history of capacity building had smaller perceived increases in capacity than those that were new to capacity building and, perhaps, had more to change.

### Participation Lesson Learned:

- Build in sufficient planning for organizational attrition and staff turnover, especially for voluntary capacity-building programs. Think through the relationship among participation, outcomes, and cost to the nonprofit and funder.

Participation in Learning Community activities was voluntary, except for the annual convening, which was required. Funding partners did not want to impose a burden on participating organizations; rather, groups were expected to select for themselves what they needed and wanted to do. There were no financial incentives to participate and no consequences for not participating (although all participating organizations were grantees of the funding partners).

Given these parameters, the Initiative's design assumed that there would be some attrition within the Learning Community as organizations and individuals found they could not make the time to participate or the Initiative's offerings did not meet their needs.

In the end, Strengthening Organizations was able to recruit 27 organizations, of which 21 (78%) were active throughout the course of the Initiative. This fully met the original expectations regarding participation.

However, it took a great deal of effort to secure attendance at any given Learning Community

activity. On average, only 40-60% of groups participated in any one event. Also, only half of participating groups took advantage of the opportunity to send multiple attendees to regional trainings. Ample time was built into the design of the Initiative for outreach, and it is unlikely that more time or additional outreach would help to improve participation or outcomes.

### Participation and Attrition

The Initiative used community organizing principles to recruit organizations and improve attendance. During the planning phase, the **"rule of halves" was used to identify targets**. The rule of halves states that at every choice point, the group of participants will drop in half. Thus, the Initiative was designed to decrease from 80 invitees to 40 applicants to 21 participants. The actual results mirrored these expectations: from 74 invitees to 48 applicants to 35 selected grantees to 21 active participants.

To encourage participation in each event, TCC organized a **coordinated campaign of personalized, repetitive points of contact** with individual participants. For each event, TCC sent an initial invitation, followed by a scripted phone message, followed by a live conversation (i.e., staff would call through contact lists until a person was reached). Once a person agreed to participate, he or she received an email reminder immediately prior to the event.

Following best practices of organizing and fundraising, TCC vigilantly **grew and maintained individual contact lists** so that ultimately more than 100 people received direct contact from TCC to encourage participation at each event. In addition, midway through the Initiative, TCC analyzed each organization's level of participation against its original capacity-building priorities and made **personal calls to some organizations that could utilize the Initiative more to increase their**

**awareness of the opportunities and encourage them to participate.**

In order to maximize participation, other capacity-building initiatives may want to test the following possible improvements to this process:

- **Having a second point of entry after the Initiative has started.** This would have allowed additional qualified organizations to join the Initiative. It may have allowed organizations that were not ready earlier but were ready later to participate. Finally, it would have refreshed the pool of participating organizations after attrition.
- **Compiling staff and board lists with the initial registration.** In this way, the Initiative would not have been so dependent on executive directors to serve as ambassadors and gatekeepers. Instead, from the very beginning, TCC could have communicated directly with a larger potential audience.
- **Providing Initiative coaching.** As described previously, TCC could have helped organizations understand their capacity-building priorities, develop a plan to address these, identify who should be involved and understand how the Initiative fit their needs.

## Participation and Turnover

Staff turnover led to organizational attrition in only one instance. In this case, a senior staff member was the primary liaison for Strengthening Organizations and left the organization. The executive director was not responsive to subsequent communications about the Initiative.

In all other cases, **staff turnover had an impact on continuity** such that organizations would miss events completely or send new attendees that were not familiar with and could not build on past activities. TCC tried to address this lack of continuity through clear messaging and

communication by email, at events, and by phone. However, most communications were event-focused. **It may have been better to provide information repeatedly about the history and purpose** of the Initiative.

TCC also reached out to new executive directors to explain the Initiative and invite participation. However, it took time to discover that an executive director had left, to schedule time to discuss the Initiative and to move a new executive director from being interested to taking action. In most cases, **it took several months to secure buy-in from new executive directors** such that they would begin to invite staff or make time to participate themselves.

The timeframe and locations may also have been an issue for some grantees. Had organizations participated in all Learning Community activities, they would have attended 32 events in less than 24 months. A few people pointed out that it was not possible for any one person or even small organizations to commit this much time. This was even more of an issue if the activity required time to travel. For the most part, people were unable or unwilling to travel more than one or two hours even though travel costs were reimbursed.

Continuity was less of an issue for Capacity-Building Grant recipients. TCC had frequent contact with the organizations, and knew relatively quickly if staff left. There was a financial incentive (i.e., the grant) for new executive directors to work with TCC. Each organization had a dedicated coach, who could remember and relay the history of that organization's involvement in the Initiative. Staff and board members were involved in developing the organizational capacity-building plan, board members were aware of and signed off on these plans, and coaches helped boards and staff think about how Learning Community activities fit with their plans.

There are several lessons that can be learned from the Capacity-Building Grants that could improve continuity among group learning participants for future capacity-building initiatives:

- Require **board and staff support** at the application phase
- Help executive directors incorporate capacity-building activities **into existing organizational plans and staff orientations**
- Hold intentional activities that encourage staff to **share lessons learned, tools, and resources with other staff** at their organizations

## Participation, Outcomes, & Cost

In terms of results, organizations that participated in more activities were likely to report additional increases in organizational capacity compared to those that participated in only a few events. Correlation, though, does not mean that there is a cause-and-effect relationship because organizations were at different levels of experience and had different needs. For example, what if organizations with the greatest room for improvement chose to attend more activities and, thus, reported greater increases in capacity?

In terms of cost, increased participation would have lowered the cost per participant and cost per organization. However, it already took significant time and resources to attain the rates of participation achieved. It is possible that there would be a diminishing rate of return (i.e., higher marginal cost for each additional person secured). Moreover, any drive to increase voluntary participation would also extract an opportunity cost to the participating organization. That is, it could take away time for an organization to do its mission-related programmatic work.

An important question emerges from this discussion – namely, **how should funders balance the level of participation, results, and costs (to funder and grantee) when trying to build capacity?**

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# Appendix

## Center for Community Advocacy (CCA) Case Study

CCA is an example of an organization that, through participation in *Strengthening Organizations to Mobilize Californians*, improved its evaluation of programs and thereby enhanced its ability to fulfill its mission. The CCA story is one of both inspiration and practical steps that combined to create lasting change in its approach to leadership and evaluation. It offers a potential road map to other organizations as they seek to increase their own capacity in a range of areas that require reflection, insight and new behavior.

### Background on CCA

The Center for Community Advocacy (CCA) focuses its work in the Salinas and Pajaro Valleys, among the richest and most productive agricultural regions in the world. This abundance and wealth exist side-by-side with great poverty and deprivation. CCA trains farm workers, their families and other low-income members of the community to become advocates for improved housing and health conditions. Incorporated in 1988, the organization describes its vision as “a community where farm workers are empowered to serve as leaders for their neighborhoods and where community decision-makers seek the counsel of these farm worker leaders.”

Seeking to empower farm workers, CCA complements these efforts with legal action. Trained in organizing, negotiation, and action skills, farm workers work in tenant committees (*comités de inquilinos*) in order to improve housing conditions. Volunteer Community well-being promotion teams (*promotores comunitarios*) are also trained to provide preventative health education in the community, conduct basic preventative health

interventions, and provide referrals to health services. Both of these programs aim to effect concrete change in the community and generate and develop farm worker neighborhood leaders.

### Initiative Objectives & Investment

As noted above, CCA applied to the Initiative to work on its evaluation of programs, in particular its leadership development program, which is central to its work. Using TCC Group’s framework for organizational effectiveness, CCA deemed this work part of its Adaptive Capacity, defined as the ability of a nonprofit organization to monitor, assess and respond to, and create internal and external changes.

CCA’s proposed activities related to two specific sub-capacities: “Programmatic Learning,” or the ability to assess client needs and use evaluation as a learning tool; and “Decision-Making Tools,” which gauge an organization’s ability to use important tools, resources and inputs to make decisions.

The capacity-building effort had both internal and external objectives. Internally, CCA sought to document a project’s effectiveness, assess and modify its neighborhood leadership development model, and use evaluation data to better monitor its allocation of resources and improve decision-making. Externally, CCA wanted to share successes with opinion leaders, civic and neighborhood leaders, investors, and the public. As the organization’s original funding proposal stated: “[CCA] need[s] to document CCA’s leadership development activities to attract more farm workers to our programs, to recruit existing stakeholders as allies

for CCA-trained farm worker leaders, and to help convince foundations to invest in CCA.”

During the planning process, CCA also identified two challenges to carrying out and implementing this work sustainably. It needed to develop evaluation instruments and processes that could be readily used by farm workers, many of whom it described as “monolingual Spanish-speaking persons with very limited formal education.” CCA also needed to learn how to approach future funders to persuade them to finance an evaluation component.

CCA received funding through the Initiative to pursue the work laid out in its original proposal. In addition to a \$100,000 grant (spread out over the three years of the Initiative), CCA staff members regularly attended training sessions. Moreover, its Executive Director, Juan Uranga, participated in the quarterly executive directors’ peer exchange group and received in-depth leadership coaching from the Initiative’s consultants at TCC Group.

### Strategic Approach

CCA moved quickly in the first year of the Initiative to develop an evaluation framework for the organization. It hired an evaluation consultant, Karina Lehrner, to facilitate the process. Lehrner took the unique approach of engaging both staff members and CCA-trained neighborhood leaders in identifying how the organization would define programmatic success, articulate a theory of change and develop a comprehensive evaluation plan and data collection instruments. CCA staff members and neighborhood leaders also participated in bilingual trainings on the administration of survey instruments.

During the next two years of the Initiative, CCA undertook an evaluation of its health promotion program. New *promotores* were surveyed both

before and after their training to assess what they had learned; the organization also held two focus groups with *promotores* as well as four focus groups with neighborhood residents participating in the health promotion program.<sup>7</sup>

Initial data gathering quickly led to significant insights and programmatic changes. For example, CCA made an important shift in how it gauged impact. Instead of focusing on the quantity of people reached, it began putting more emphasis on quality and depth of engagement with a small number of participants. Its overarching goal within this new framework shifted to creating actual change in health behaviors.

While CCA gained profound insight into its approach to a core program, it was less successful with its other goals surrounding communication. CCA was unable to make significant progress in communicating success with stakeholders and the public to increase donations and grants. This goal was not laid out in the original objectives of the Initiative grant, but Executive Director Uranga views it as a priority moving forward. He plans to seek additional funding to hire a consultant to help create a communications strategy and plan.

### Results and Lessons Learned

Uranga is an eloquent voice for the power of the Initiative to help an organization hone its strategy and, ultimately, better serve its mission. The development of an evaluation plan, he says, had a critical impact on CCA. As noted above, it led almost immediately to changes in CCA’s health promotion program.

These shifts will not only facilitate future data gathering and evaluation, but improve the quality of the program by shifting its focus from raising

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<sup>7</sup> *Promotores* are volunteer, CCA-trained, neighborhood leaders who learn about and deliver preventative health education to their peers.

awareness to actual behavior change among farm workers. With an initial evaluation of the program completed, CCA staff, board, and neighborhood organizers will continue to review the findings and make further improvements.

The process also helped organizational stakeholders better understand CCA's health promotion programs, says Uranga. They now realized that the program had evolved to the point where it would benefit from a more formalized and structured design. The evaluation also enhanced CCA's resource allocation, both in terms of its own budget development and its partnerships. Uranga notes that this improved decision-making has improved CCA's "ability to stay focused on its mission, make mission-based decisions, and avoid efforts that do not move the mission forward."

Beyond these tangible improvements, CCA's evolution through the course of the Initiative speaks to deeper gains rooted in a philosophical shift. It has become more of a learning organization, one that has successfully brought together staff, board members, and CCA-trained neighborhood leaders. Together they not only undertook an evaluation, but considered the findings in an open-minded way and weighed changes to programs.

"The willingness and openness to the new information and the adaptability to move forward," Uranga says, "provided a positive environment and cohesive sense of morale within the organization." Lehrner, CCA's evaluation consultant, agrees that the evaluation process "shifted the organization. It promoted an organizational culture in which stakeholders are eager to learn what works, what does not, and adapt and improve programs accordingly."

CCA's experience also offers lessons for other organizations. Namely, capacity building is time-consuming and can even bring frustration. One example: Development of CCA's logic model,

evaluation plan, and data collection instruments took nearly all of the first year of the Initiative, much longer than anticipated. In the end, however, Uranga says there was value in spending time to undertake a process that, in his words, "would ultimately operationalize and internalize evaluation as an integral component of CCA's work."

Taking part in the Initiative brought other benefits, some of them unexpected. Uranga found that his participation in the Initiative's peer exchange and coaching from TCC shifted his thinking about leadership and management. Previously, Uranga had assumed all decision-making authority for the organization. But motivated by what he learned from other executive directors in the peer exchange, he began to engage others within CCA in the decision-making process and delegate more responsibility.

This process, he explains, brought a fundamental re-examination. As he says, it "allowed me to transform CCA from an ED-centered organization to an organization replete with meaningful delegation. This, in turn, allowed me to use 'peer coaching' techniques to achieve staff support as the evaluation project unfolded and ... for the program modifications that resulted from the project. In particular, the techniques of asking open-ended questions and listening assertively were very helpful in getting all of us to "yes.""

Uranga's personal skills evolved along with the organization. He observes that, "I learned how to communicate and listen so staff feel that they are making decisions. Put differently, coaching taught me how to share power but maintain authority." He adds that, while shared leadership has always been an integral part of CCA's organizing model, "the Initiative helped CCA bring that concept in-house."

Indeed, in his report to The James Irvine Foundation about the first year of the Initiative, Uranga wrote that he had previously “overlooked an important organizational strength: the intellectual capacity of CCA’s organizers.” The organizers, he reported, played a critical role in working with Lehrner to develop an evaluation plan that was fully integrated into CCA’s programs and organizing.

Sabino López, CCA’s Lead Organizer, offers his own perspective on this effort. He says that Uranga’s changed leadership style enabled a broader contingent to create stronger program strategies and outcomes and led to better staff engagement and morale.

Lehrner, CCA’s evaluation consultant, underscores the paradox involved: the executive director played a central role by, in effect, making his role less central. “Juan provided the leadership structure, gave staff legitimacy, and facilitated the staff taking ownership of the evaluation process,” Lehrner observes. “The coaching and peer exchange,” she adds, “created a tremendous context for learning. It provided the leadership structure that could support this kind of organizational change. It also supported my work because it created an environment in which I could work with anyone within the organization, knowing that I had the leadership’s support in doing so.”

This inclusive approach to evaluation, while more time-consuming, also helped CCA successfully meet one of the challenges in its original funding request: developing evaluation instruments and processes that could be readily used and implemented by farm workers.

In the end, notes Lehrner, CCA significantly strengthened its adaptive capacity through the course of the Initiative. This change stemmed from both the program evaluation itself and the organization’s newly inclusive approach to

leadership and stakeholder engagement. Furthermore, CCA’s ability to make meaningful sense of the evaluation and effect improvements in the programs reinforced the value of systematically integrating evaluation into its future programmatic efforts.

## Next Steps

Uranga’s final reflection on the meaning of participating in *Strengthening Organizations to Mobilize Californians* best summarizes the Initiative’s impact:

“CCA staff is committed to the belief about the importance of evaluation as much as service delivery; therefore, incorporating evaluation into all of our work now is valued and considered as a key element for new and existing programs. Evaluation is utilized, moreover, as a learning tool. ... The idea that evaluation is solely for the purpose of complying with grant objectives or as an external, final stage of program assessment is no longer common practice.”

He continues, “CCA will be able to utilize the evaluation report ... to educate, inform, and further inquire about how CCA can continuously improve its programming and organization [with] various stakeholders. As a result, CCA has an important marketing tool that highlights our work which may result in increased awareness of our organization and programs and lead to partnership opportunities and additional sources of support.”

Moving ahead, Uranga believes the changes achieved through the Initiative will be lasting. CCA, he says, will continue to engage stakeholders in organizational learning to improve its programs and – even more important – to further its mission.

## About TCC Group

For more than 30 years, TCC Group has provided strategic planning, program and grants management, evaluation, and capacity-building services to foundations, nonprofit organizations, corporate community involvement programs, and government agencies. In this time, the firm has developed substantive knowledge and expertise in fields as diverse as education, arts and culture, community and economic development, human services, health care, the environment, and children and family issues. From offices in New York, Philadelphia, and San Francisco, the firm works with clients nationally and across the globe. Services include business planning, organizational assessment and development, research, feasibility studies, organizational evaluation, board development, restructuring and repositioning, as well as grant program design, measurement, and management. TCC Group has extensive experience working with funders to plan, design, manage, and evaluate initiatives to strengthen the capacity of nonprofit organizations.

If you have questions about the lessons learned from this initiative, please contact Paul Connolly or Susan Misra.

**Paul Connolly**, Senior Partner  
[pconnolly@tccgrp.com](mailto:pconnolly@tccgrp.com)

**Susan Misra**, Associate Director  
[smisra@tccgrp.com](mailto:smisra@tccgrp.com)

[www.tccgrp.com](http://www.tccgrp.com)

